

SPRINT 3

Date	18 November 2022
Team ID	PNT2022TMID32337
Project Name	Project – AI BASED DISCOURSE FOR BANKING INDUSTRY

Sprint-3	Current Account Creation	USN-8	As a user, I can create a current account with the provided guidelines by the bot. The Bot will be providing the step-by-step ways to create a current account.	2	High	Praveen.S, Parasuram viswanathan
Sprint3	Loan account creation	USN-9	As a user, I can create a loan account with the provided guidelines by the bot. The Bot will be providing the step-by-step ways to create a loan account. We can also get details about as loan such as list of loan schemes available, Loans for education, Loan for business, Loan amount for each scheme.	2	High	Kishore, Raj kumar.j

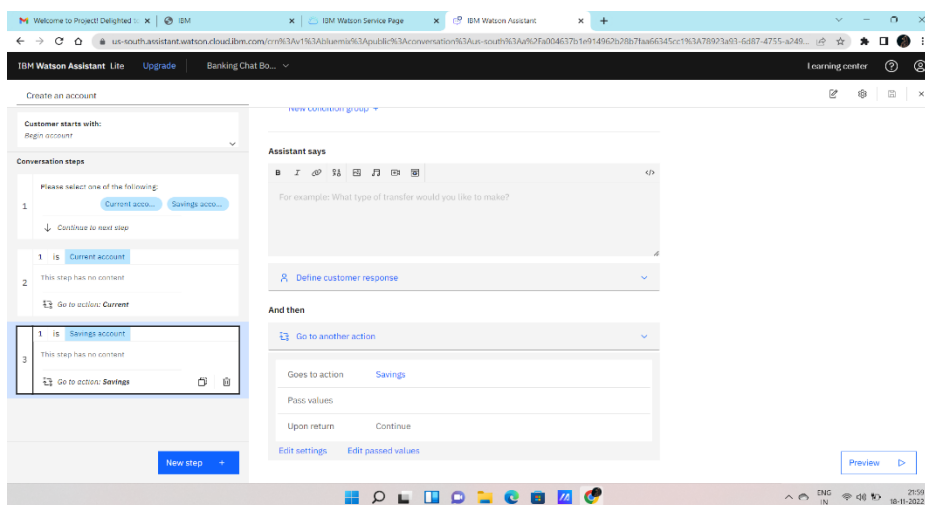
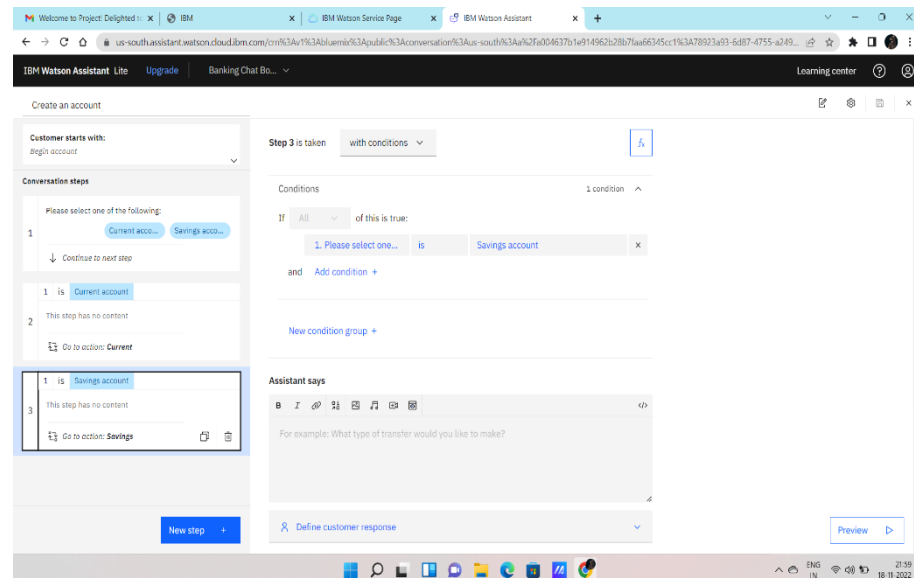
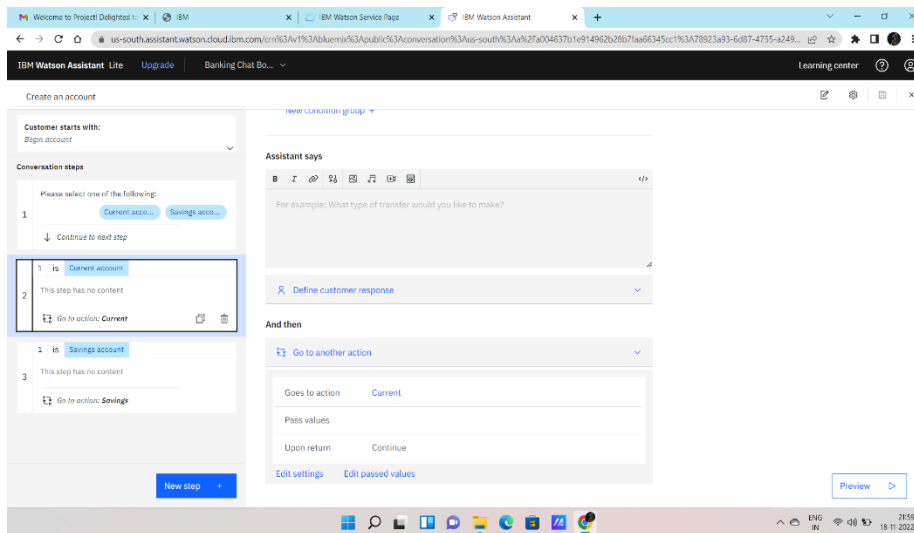
USN-8 CURRENT ACCOUNT CREATION

This screenshot shows the IBM Watson Assistant interface for designing a 'Create an account' workflow. The interface is divided into several sections:

- Customer starts with:** A dropdown menu set to 'Begin account'.
- Conversation steps:** A list of steps for the conversation flow.
 - Step 1: 'Please select one of the following:' with buttons for 'Current acco...' and 'Savings acco...'. Below it, a 'Continue to next step' button.
 - Step 2: 'This step has no content' with a 'Go to action: Current' button.
 - Step 3: 'This step has no content' with a 'Go to action: Savings' button.
- Customer starts with:** A section for defining phrases that trigger the workflow.
 - Enter phrases that a customer types or says to start the conversation about a specific topic. These phrases determine the task, problem, or question your customer has.
 - The more phrases you enter, the better your assistant can recognize what the customer wants.
 - A list of phrases to enter, with a 'Total: 18' indicator.
 - Example phrases: 'Where do I register for this?', 'Where do I find guidance on signing up?', 'Where can I register?', 'What is the process to making an account?', 'What is required to get signed up here?'.
 - A 'Preview' button at the bottom right.

This screenshot shows the IBM Watson Assistant interface for designing a 'Create an account' workflow, providing more detail than the first image. The interface includes:

- Customer starts with:** A dropdown menu set to 'Begin account'.
- Conversation steps:** A list of steps for the conversation flow.
 - Step 1: 'Please select one of the following:' with buttons for 'Current acco...' and 'Savings acco...'. Below it, a 'Continue to next step' button.
 - Step 2: 'This step has no content' with a 'Go to action: Current' button.
 - Step 3: 'This step has no content' with a 'Go to action: Savings' button.
- Assistant says:** A section for defining the assistant's response.
 - Step 1 is taken: 'without conditions'.
 - Assistant says: A text area for the response, containing 'Please select one of the following:'.
 - Buttons for 'Savings account' and 'Current account'.
 - Buttons for 'Edit response' and 'Edit validation'.
- And then:** A section for defining the next action in the workflow.
 - Continue to next step: A dropdown menu set to 'Continue to next step'.



USN-9 LOAN ACCOUNT CREATION

The screenshot shows the IBM Watson Assistant interface for a "Loan" conversation. On the left, the "Conversation steps" panel lists three steps: 1. "What type of loan are you looking at?" with options "Vehicle loan", "Student loan", and "+3"; 2. "To be eligible for a house loan please contact our bank service providers with all existing loan details." with a "Go to action: End" button; 3. "Please approach the bank with the following documents 1. Pan card 2. Aadhar card 3. Passport..." with a "Go to action: End" button. Below these steps is a "New step +" button. On the right, the "Customer starts with:" panel shows a list of phrases: "Loan", "lend a load", and "credit a loan". A "Preview" button is located at the bottom right of the interface.

The screenshot shows the IBM Watson Assistant interface for a "Loan" conversation, now in a more detailed view. The "Conversation steps" panel on the left is the same as in the previous screenshot. The main area on the right shows the "Assistant says" section with the text "What type of loan are you looking at?". Below this, there is a "Choose an option" dropdown menu. The "And then" section shows a "Continue to next step" button. A "Preview" button is located at the bottom right of the interface.

IBM Watson Assistant interface showing a conversation flow for a loan application. The interface includes a sidebar with conversation steps, a main workspace for defining conditions and actions, and a preview pane.

Conversation Steps (Left Sidebar):

- 1. What type of loan are you looking at? (Vehicle loan, Student loan, +3)
- 2. To be eligible for a house loan please contact our bank service providers with all existing loan details. (Go to action: End)
- 3. To be eligible for a gold loan please contact our bank service providers with all existing loan details. (Go to action: End)
- 4. To be eligible for a top up loan please contact our bank service providers with all existing loan details. (Go to action: End)

Step 2 is taken with conditions:

Conditions: 1 condition

If All of this is true:

- 1. What type of loan... is House loan

and Add condition +

New condition group +

Assistant says:

To be eligible for a house loan please contact our bank service providers with all existing loan details.

Define customer response

Preview

IBM Watson Assistant interface showing a conversation flow for a loan application. The interface includes a sidebar with conversation steps, a main workspace for defining conditions and actions, and a preview pane.

Conversation Steps (Left Sidebar):

- 1. What type of loan are you looking at? (Vehicle loan, Student loan, +3)
- 2. To be eligible for a house loan please contact our bank service providers with all existing loan details. (Go to action: End)
- 3. To be eligible for a gold loan please contact our bank service providers with all existing loan details. (Go to action: End)
- 4. To be eligible for a top up loan please contact our bank service providers with all existing loan details. (Go to action: End)
- 5. To be eligible for a vehicle loan please contact our bank service providers with all existing loan details. (Go to action: End)

Step 4 is taken with conditions:

Conditions: 1 condition

If All of this is true:

- 1. What type of loan... is Top up loan

and Add condition +

New condition group +

Assistant says:

To be eligible for a top up loan please contact our bank service providers with all existing loan details.

Define customer response

Preview

IBM Watson Assistant interface showing a workflow for loan eligibility. The left pane lists steps: 3 (Approach bank with documents), 4 (Top up loan eligibility), 5 (Vehicle loan eligibility), and 6 (Student loan eligibility). Step 5 is selected and expanded in the right pane.

Step 5 is taken with conditions

Conditions: 1 condition

If All of this is true:

- 1. What type of loan... is Vehicle loan

and Add condition +

New condition group +

Assistant says

Kindly approach the bank with the following documents

- 1. Automobile Invoice
- 2. Pan card
- 3. Income Tax Returns for the last three years.

Define customer response

Preview

IBM Watson Assistant interface showing the same workflow, but with the 'And then' section expanded for Step 5.

Assistant says

Kindly approach the bank with the following documents

- 1. Automobile Invoice
- 2. Pan card
- 3. Income Tax Returns for the last three years.

Define customer response

And then

Go to another action

Goes to action: End

Pass values

Upon return: Continue

Edit settings Edit passed values

Preview

Welcome to Project Delighted | IBM Watson Assistant

us-south.assistant.watson.cloud.ibm.com/crn%3Av1%3Abluemix%3Apublic%3Aconversation%3Aus-south%3Aa%2Fa004637b1e914962b28b7faa66345cc1%3A78923a93-6d87-4755-a249...

IBM Watson Assistant Life Upgrade Banking Chat Bo... Learning center

Loan

3

Please approach the bank with the following documents 1. Pan card 2. Aadhar card 3. Passport...

Go to action: End

1

is Top up loan

4

To be eligible for a top up loan please contact our bank service providers with all existing loan details.

Go to action: End

1

is Vehicle loan

5

Kindly approach the bank with the following documents
 1. Automobile Invoice 2. Pan ca...

Go to action: End

1

is Student loan

6

Please approach the bank with the following documents 1. Acceptance letter from institution 2...

Go to action: End

New step +

Step 6 is taken with conditions

Conditions

1 condition

If All of this is true:

1. What type of loan... is Student loan

and Add condition +

New condition group +

Assistant says

Please approach the bank with the following documents

1. Acceptance letter from institution

2. Pan card

3. Passport size photos

Define customer response

Preview

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